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Software Application Training

For

Community Partnerships for Sustainable Resource Management (COMPASS II)

By

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ANNEXES:

I.   INTRODUCTION

During the project start up phase for COMPASS II, Chief of Party (COP) Todd Johnson identified the need for the staff of COMPASS II to receive training on key software packages. These include Windows, Word, Excel, PowerPoint and the DAI Notes–based communications and management and administrative systems. It was proposed that DAI's OIT Junior Business Analyst travel to Blantyre, Malawi to provide on-the-job training to the COMPASS II Team.

In August 2004, Ms. Mary Campbell, Junior Business Analyst, trained thirteen users in Microsoft Office 2003, Lotus Notes, Lotus Notes Mail, GRIC, Symantec Antivirus, and Internet Explorer. The objectives of these training sessions were

> a.   To teach the fundamentals of Windows, Word, Excel, PowerPoint and Internet Explorer
> b.   To give the staff a formal Lotus Notes training and Notes Mail for Travelers Training
> c.   To expand beyond the basics of Word and Excel and focus more on Intermediate and Advanced features.

II.   METHODOLOGY

Upon arrival in Malawi, Ms. Campbell met with Todd Johnson to discuss the training implementation. Three key needs were identified:

> a. Assess the users' needs.
> b. Provide group and individual training.
> c. Develop forms and templates

After meeting with the COP, Ms. Campbell collected the User Needs Assessment Surveys that had been sent prior to her departure. Then individual meetings were held with the COMPASS II staff to review the individual user's needs and determine what specific topics would be covered in the individual training sessions. Specific topics included creating mail merges and tables, using section breaks, creating templates in Word, creating templates in Excel, working with graphics in Word, and creating complex formulas in Excel.

Both Ms. Campbell and Mr. Johnson agreed that group training would be held in the morning and follow-up or individual training would be held in the afternoon. Using this approach would give the students the opportunity to practice what they had learned in the morning session, and then meet with Ms. Campbell in the afternoon with any questions.

Ms. Campbell and Mr. Johnson also discussed the types of forms that the project needed for basic office functionality. Ms. Campbell created these forms when time permitted.

III. COMPASS TRAINING

A total of thirteen users were trained in Lotus Notes, Notes Mail, Notes Mail for Travelers, Microsoft Office 2003, Symantec Antivirus, and Internet Explorer. An additional training session was added the second day, because several users were not familiar with computers. All group sessions were held in the COMPASS II Meeting Room and ranged from one to three hours long. Sixteen individual training sessions were held based upon the needs assessment that was performed the first and second days. Details about each training session are as follows.

Training Session One: Office 2003 and Templates Overview
A few staff members had been using Office 2003 for a short period of time. However, a refresher was needed and definitely necessary for the staff that had no experience with using any type of Office Suite software.

Training Session Two: Beginning Microsoft Word 2003
The goal of this session was to introduce Microsoft word and become more proficient in Microsoft Word. Topics covered were the following:

- ❖ Views in Word
- ❖ Navigating through Word
- ❖ Formatting and selecting text
- ❖ Customizing Word's interface
- ❖ Using Words Help feature.

Training Session Three: Computer Basics
This session was dedicated to working with users who had no experience with computers. Topics covered were the following:

- ❖ How to turn on a computer
- ❖ How to open a software program
- ❖ Creating simple documents in Word and Excel.

Training Session Four: Beginning Microsoft Excel 2003
This session was dedicated to the more basic users of Excel. Topics covered were the following:

- ❖ Creating simple spreadsheets
- ❖ Improving the appearance of a worksheet
- ❖ File management and compatibility issues
- ❖ File recovery
- ❖ Printing spreadsheets

Training Session Five: Microsoft PowerPoint 2003
Very few users had any knowledge of Power Point. There were two or three users that had created presentations. However, their knowledge was self-taught. Topics covered were the following:

- ❖ Touring the Power Point screen elements
- ❖ Creating a Power Point screen presentation from scratch and from templates
- ❖ Running a Power Point slide show.

Training Session Six: Internet Explorer and Symantec Anti-virus
No staff members had experience using Symantec Anti-virus. Topics covered were the following:

- ❖ Updating virus definitions
- ❖ Scanning your computer for viruses
- ❖ What to do if your computer is infected
- ❖ Basic Internet Explorer features

Training Session Seven: Lotus Notes 6.5
None of the staff had used Lotus Notes previously. Topics covered were the following:

- ❖ DAI's e-mail policy and guidelines
- ❖ Notes 6.5 e-mail
- ❖ Notes Calendar
- ❖ Personal Address Book
- ❖ Sametime Instant Messaging

Training Sessions 8 and 9: Intermediate and Advanced Word and Excel
These sessions were required for more experienced users. There were 5 users for whom this was specifically tailored. Topics covered in the Word trainings included:

- ❖ Creating Headers And Footers
- ❖ Working With Graphics
- ❖ Creating Lines
- ❖ Navigational Shortcuts
- ❖ Customizing Word's Interface
- ❖ Highlighting Text
- ❖ Creating and Using Bookmarks
- ❖ Creating Tables
- ❖ Using the Track Changes Feature
- ❖ Mail Merge

Topics covered in the Excel trainings included:

- ❖ Working With Ranges
- ❖ Working With Cell References
- ❖ Creating Intermediate Formulas
- ❖ Linking Spreadsheets And Workbooks
- ❖ Conditional Formatting
- ❖ Formula Auditing Toolbar
- ❖ Using Cell And Worksheet Protection Techniques

- ❖ Creating 3d References To Cells On Other Worksheet
- ❖ Using The Watch Window Feature
- ❖ Annotating A Worksheet
- ❖ Pre-Printing Techniques
- ❖ Displaying Multiple Workbooks

These topics greatly enhanced the every day performance of the users who attended.

Training Session 10: Lotus Notes 6.5 for Travelers
This was essential for the entire staff as many had reported that they would at some point be traveling for the project. Topics covered included:

- ❖ Applying the three phases of the Notes Mobile Life Cycle.
- ❖ Using the various Local replica databases on your laptop
- ❖ Using GRIC, DAI's corporate Internet Service Provider (ISP), to update Anti-virus Definitions
- ❖ Replicating your mail file while using GRIC

Evaluations (see Annex E) were distributed at the end of the final training session as students were offered the opportunity to make suggestions and improvements for future training sessions. The majority of the evaluations were favorable, and several offered useful suggestions (identified in Section IV, Recommendations).

IV. RECOMMENDATIONS

The objectives for the COMPASS II training were met -- everyone was trained in the basics of Microsoft Office 2003, Lotus Notes, Lotus Notes Mail, GRIC, Symantec Antivirus, and Internet Explorer. Intermediate and Advanced courses were held in Excel and Word. Training manuals outlining functions and features of each software package were provided as user references for the staff. All users showed a significant increase in performance, especially in Power Point, Lotus Notes 6.5, and advanced Word functions.

Recommendations for future training sessions are as follows:

❖ Due to the project being in the early stages of start up it was quite difficult to devise a schedule that did not conflict with staff responsibilities. Though training was absolutely necessary at this time in order for the staff to function in their daily tasks, follow up training is highly recommended. The majority of the staff had very busy schedules and critical deadlines that had to take precedence over the trainings. While individual sessions were held for each staff member who needed updates on what they had missed, their time was limited and they were not able to dedicate the time needed to fully utilize all of the training provided. Merely reviewing documentation on their own time does not provide for full absorption of the material.

❖ Per the follow-up training sessions, the students did a great job in practicing what they had learned earlier in the day with the little time that they had. Their time constraints did inhibit them from fully covering all the material provided.

❖ Many challenges made it difficult to provide the full training in some of the classes. For example, phone lines were not yet set up so it was not possible to fully display how to connect using GRIC with a modem.

❖ Ms. Campbell would like to stress that staff should continue to use to their user guides and manuals as they are a great reference. Furthermore, Ms. Campbell recommends that follow up training sessions be held when all staff positions have been filled and the current staff's schedules are less demanding.

Annex A

Pre-Training Needs Assessment Survey

Annex B

Training Schedule

Annex C

Manuals

Annex D

Reference Guides

Annex E

Evaluations

Annex F

Forms Created

PowerPoint 2003

Quick Reference Guide

Word 2003

Quick Reference Guide

Windows XP

Quick Reference Guide

Excel 2003

Quick Reference Guide

Windows 2000

Quick Reference Guide

Internet Explorer 6

Quick Reference Guide

Lotus Notes 6.5

Quick Reference Guide